

Remote and hybrid agent playbook

This is a manual to help you prepare your contact centre with a business continuity plan to make remote work a functional reality for the long term.



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Background

It's difficult to know exactly what the future of work will look like in customer service. Unfortunately, none of us have a crystal ball to see exactly what's going to happen. Regardless of the details, remote work will continue to play a part in the hybrid arrangements of contact centres. It's imperative to manage your workforce and deliver an excellent customer experience, regardless of where agents are working from.

Problem

Prepare your contact centre for the future by moving to a cloud-based platform to support your agents wherever they are.

Solution

- Incorporate digital channels like live-chat, messaging and social to better manage inbound call volume and service customers on their channel of choice.
- Use a unified communications tool to allow agents to collaborate across the business and resolve customer interactions quickly.
- Provide the service your customers expect with a fully connected, engaged and empowered team.



The asset value proposition

To learn what changes with remote support teams, what strategies you can implement now, and how to manage your teams across locations to service customers.

Top takeaways

- Give agents the tools they need to do their job well.
- Connect frontline contact centre workers with the rest of your organisation to give them access to critical information and help solve complex customer queries.
- Manage talent better. Hiring, onboarding, training and retention – all can be done remotely or in-house.

Go Remote. Learn more about RingCentral customer engagement solutions to see how you can keep your business running in any situation.

Benefits of letting agents work from home

New communications apps have certainly made it easier for some employees to do their jobs from the comfort of their own home, but for some industries and positions, such as contact centre workers, managers question whether the practice could lead to lower productivity.

Though you may not be thrilled about having your employees work remotely, there are numerous business benefits to having a remote or hybrid customer support team. Here are some of the top advantages of working from anywhere. If your contact centre has the ability to utilise a remote workforce, this change may make a powerful, beneficial difference to the way you do business.

What are the benefits of remote or hybrid working?

The decision to move from an office setting to a virtual team affects everyone in the business, so it's important to know the benefit for your team and customer service. There are many ways to implement remote work, each with its own perks, but there are some benefits that everyone can experience.

1. Increase productivity

Though many business owners and contact centre managers worry about work getting done from home, increased productivity is often the biggest benefit of a remote team. A study presented in the *Harvard Business Review*, for example, showed that remote workers accomplished almost a full additional day's

amount of work per week when compared to on-site employees. [Another study](#) found that 45% of remote employees can get more done in less time and 44% are less distracted and more productive than they would be at the office.

For some agents, the ability to find the best environment and schedule for their needs naturally leads to better work. For others, improved productivity is a way to pay back companies that allow them to work from home.

79% of contact centre agents now want to work in a hybrid arrangement¹

Agents who are more focused and productive can increase the number of resolutions they can achieve each day. As they spend more time taking calls and interacting with customers, your business can offer faster service and improve customer satisfaction.



2. Save money in every department

Much of the costs associated with a business overhead go to maintaining physical locations. While the biggest cost is real estate, they also have to pay for utilities, furniture, office supplies, cleaning services, internet access and more.

Downsizing the physical contact centre allows you to reduce property-associated costs. Some of that capital will be needed in the short term to ensure office space is safe for on-site employees, and some can be freed up to reinvest in technology for a consistent employee experience no matter where agents are located.

According to *Inc. Magazine*, remote workers can save between £1,500 and £5,500 annually on food, childcare, travel, and personal items. These savings can lessen your team's stress across the board, contributing to higher job satisfaction and output.

1. Source: [Are we ready for the hybrid future?](#)

3. Offer flexible schedules

A flexible schedule is one of the greatest contributors to productivity. When agents can determine when it works best to spend time on business tasks, they can find the schedule that produces the best results. While some of your agents may work typical office hours, others can choose to work earlier or later shifts.

This allows your workers to find a more satisfying schedule, but it also extends your live-agent customer service beyond normal business hours, enabling late-night social media interactions or early morning calls.

4. Improve work-life balance

Agent burnout is a serious threat, especially when your staff has to juggle family and personal needs with hourly shifts. By allowing agents to work flexibly, you offer the ability to find the right balance. See our [Agent Experience Trends report](#) for more on this.

5. Gain access to the world's best workers

When your agent search isn't limited by location and schedule, you gain access to a wider knowledge base that can revolutionise the quality and depth of your team's abilities.

The flexibility and benefits you can offer with a fully remote or hybrid position are also more attractive to the talent you want. In a study completed by FlexJobs and Global Workplace Analytics, they found that telecommuters earn, on average, £3,000 more annually than on-site workers in the same position. Greater control over their work also leads to happier agents, which can then benefit you and your work immensely.



What changes with remote or hybrid customer support?

By supporting hybrid work as part of your employee experience you will benefit greatly, but of course you need to do it well. Work done anywhere needs to be a natural extension of the more familiar work experience.

Hybrid work will be with us for many years. You'll need to create a consistent employee experience, whether in-office or remote.

Companies must ensure all employees are connected and engaged from wherever they are – even for longer-term periods.

As a contact centre agent, how do I provide customer support from anywhere?

It's most likely you'll be using a cloud-based platform, so your job will change little whether you're in the office, working from home or from anywhere. You'll still spend your days handling customer interactions and offering exceptional customer service. Aside from the possible child or pet interruption, customers won't even notice the change.

1. Prepare your workspace

Essential basic hardware is simply a microphone-enabled headset and a laptop. You'll also need secure access to remote work tools via a reliable high-bandwidth internet connection. Ideally, find a place with natural light, where you're likely to be undisturbed, and where you can work with a healthy posture.

2. Get started taking calls

By now you should have remote access to a cloud-based contact centre platform and should be able to work from Windows or Mac computers or even mobile devices. Your dashboard will look and function the same as it does in the office, so there's no big adjustment required.

3. Manage customer interactions

Customers will still keep bringing you their questions. Just as in the office, you'll use the contact centre software to have conversations. You'll be able to maintain customer happiness and continue your work without interruption.

4. Collaborating with team members

Your co-workers won't always be next to you, so you will mostly collaborate virtually.

For example, rather than asking a question aloud, you might send a colleague a direct message or post the question in a team chat.

Instead of walking down the hall to a meeting room, you'll access remote virtual meetings.



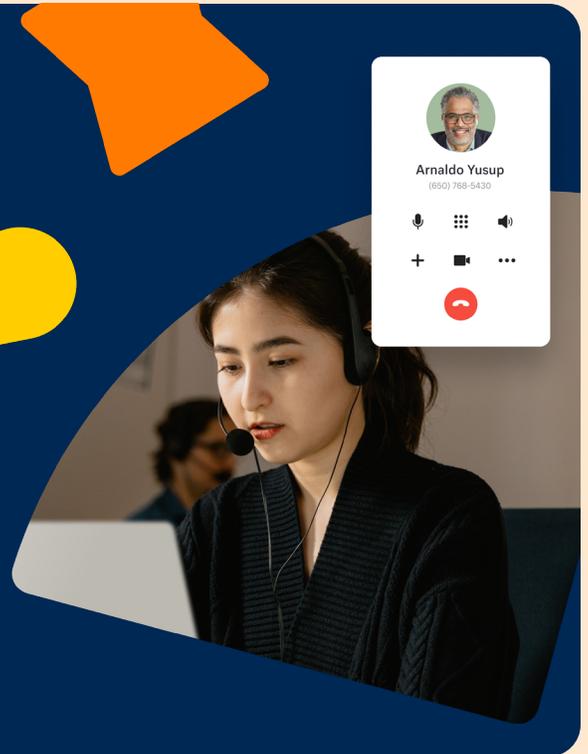
How to manage contact centre agents working from anywhere

Some contact centres have found it challenging to manage agents when their customer service team is spread across multiple locations. Modern contact centre software has functionality to help make that much easier.

By adjusting your approach and making the most of the tools available, you can maintain high call centre and agent performance regardless of location.

How do I effectively manage agents working from anywhere?

Since your agents aren't in the same location, managing them can be trickier than it was before. You can't walk the floor or physically interact with your whole team, but you are still responsible for keeping agents engaged and productive no matter where they are. With the tips in this guide to managing a hybrid workforce, you can continue improving customer experiences and achieving great results for your business.





1. Video conferencing for team meetings

Video conferencing connects agents and keeps them informed. When you meet with your team, include remote agents via video conferencing and use in-call tools like screen sharing and whiteboarding so everyone has access to the same visual references.

Video technology gives each virtual agent a face, strengthening the connections they make and helping them build important relationships with co-workers. Helping employees feel included improves engagement and results in high customer satisfaction.

2. Strong company culture

Successful managers put time and energy into creating a positive company culture. Agents working remotely are physically removed from co-workers and the contact centre, which threatens to create a disconnect with the company as a whole.

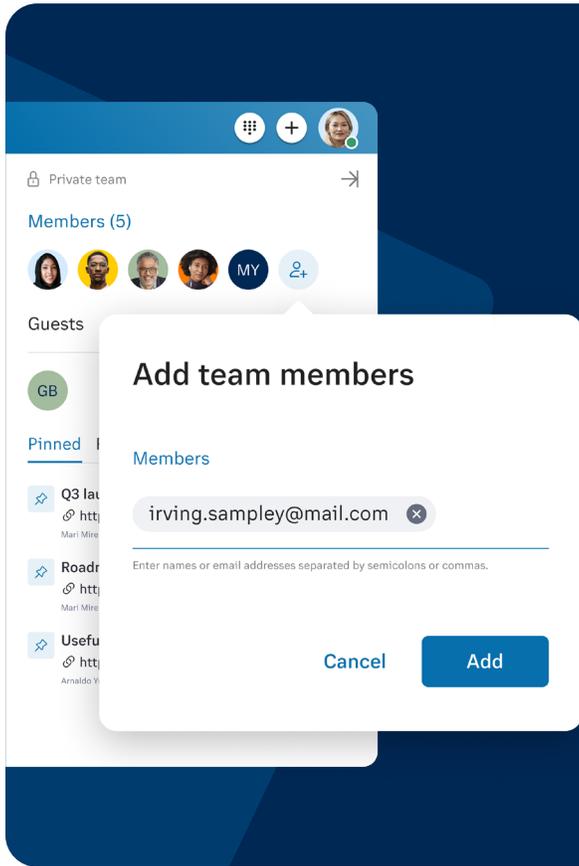
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3. Use workforce management tools

Like typical performance management, remote or hybrid is based on the data and metrics you gain from your contact centre software. If you see a dip in customer satisfaction, for example, you can use relevant information to identify your contact centre's strengths and weaknesses.

When evaluating your contact centre and team, the ability to view agent activity and call data is an invaluable asset. You can use call logs to determine the number of calls they take and the length of each interaction. Using this information, you can then see how their performance measures against your standards. If you see a particular area that needs improvement, you can then focus on training efforts for improved agent optimisation.



4. Offer collaboration tools

When choosing your contact centre software, look for an option with agent-centric communication tools. If agents are collaborating on a project, for example, they need the ability to message each other and share files internally. Your resources should always support, not hinder, your agents' work.

Collaboration tools are also a valuable asset for agents who need assistance during a customer interaction. If you notice an escalating conversation while call monitoring, you can use these tools to join the call without the customer's knowledge. By offering coaching in real-time, you can help your agents remain confident in their work.

5. Gamify your customer service

Everyone loves to play and win games, which is why workplace gamification is so effective at promoting productivity and improving results. This technique uses rewards and recognition as "prizes" for employees who achieve the highest results in your contact centre, appealing to each agent's competitive side as they work.

When gamifying your customer service, you can motivate your agents to increase the number and quality of their customer interactions. Agents are pushed to do better in their work, which then increases the quality and results of your customer support as a whole.



6. Develop a detailed training programme

Employee experience is now the big differentiator when it comes to long-term success. Engaged employees are over 20% more productive than non-engaged employees, so it's critical for contact centres to invest in their employees. Training and development is a big part of that.

Instead of trying to micro-manage a distributed workforce, managers need to take on more of a coaching role to help agents get the best out of themselves. Agents working remotely won't have the benefit of working alongside a more experienced agent, so you need to offer resources that provide the same level of knowledge and proficiency.

You need your new hires to be both amazing agents and effective anywhere workers. As you train them in customer service, prepare them for the requirements of hybrid work. Cover the policies and expectations you have for the office and for their workspaces, conduct during shifts, and participation in team efforts.

7. Monitor customer service quality

While you might be happy with the number of calls your agents are able to make and take, these numbers are useless if your customers aren't happy with your service. Quality monitoring allows you to ensure your contact centre is succeeding on all fronts, providing value to your company.

Use your quality assurance tools

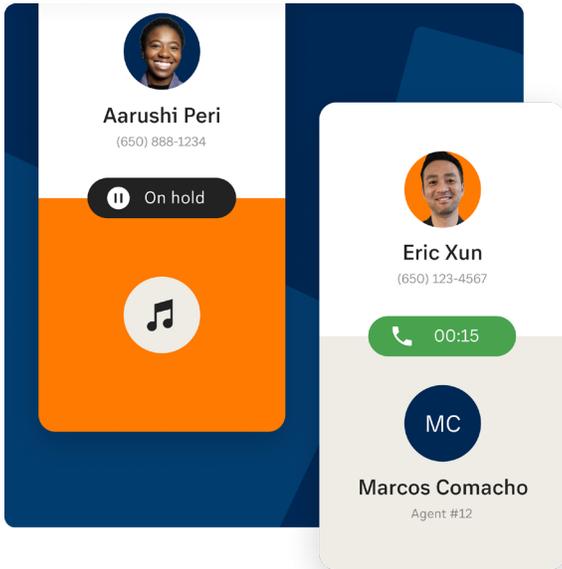
1. Use speech analytics to determine customer satisfaction during support calls.
2. Audit your calls to ensure agents are following contact centre best practices.
3. View data on first-contact resolutions to determine if your agents are providing adequate support.

Utilise a hands-on approach to management

1. Proactively manage and monitor all of your agents.
2. Take action if you notice an agent struggling with their work.

Manage contact centre compliance

1. Evaluate the processes your agents use to manage sensitive data.
2. Check your call logs to see if you've followed DNC list rules.
3. Protect your contact centre and company from potential future fines and litigation by monitoring calls.



Micromanaging can damage workplace satisfaction, so use call recordings and past interactions to gather the information you need rather than hanging over agents' shoulders.

If you need to take a more proactive approach, however, don't be afraid to use whisper coaching and silent listening to guide agents through calls. Your contact centre tools and the ways you use them can make all the difference between guidance and overbearance.

8. Gather contact centre and customer service feedback

The best way to learn is always to listen. As you manage your hybrid operations, gather feedback to discover the areas that need the most work. Gathering feedback is only effective when you keep an open mind, so be willing to hear hard truths and different opinions.

Listen to your customers

- Use satisfaction surveys to invite comments from customers.
- Allow customers to rate their experiences and give recommendations for improvements.

Communicate with your agents

- Ask your agents about your policies and procedures to learn what is and isn't working.
- Give employees the opportunity to make suggestions. Use insights to inform change
- Use the feedback management tools mentioned above to make something useful from the insights you gather.
- Keep yourself honest by translating insights into action and make improvements where they're needed

The virtual contact centre starter kit

Your hybrid or remote contact centre starts with your agents. Since you aren't limited by geographical constraints, you can hire local employees or use a globally distributed team. The resources you'll need include internet connectivity, a marketing software solution, conferencing tools and any hardware your agents need to connect.

While some of these tools are high-end, more costly options, there are many tools designed for small businesses and budgets. As you build your virtual contact centre toolkit, work with providers to design the solution that best meets your customer service and budget requirements.

What equipment do agents need when working remotely?

Your customer service now relies on team collaboration, so you need to equip your agents with resources that allow them to reliably connect with co-workers and customers from their homes.

Internet service

Working remotely relies heavily on your agent's internet connection and speed. When setting your agents up, test their network's performance and speed. If the results aren't ideal, consider paying to upgrade their service. While it might not matter which IP address they use, you don't want to limit productivity with poor connections.



Computers and mobile devices

Agents can use either company-issued or personal devices in their home offices. Your platform will work with any laptops, desktops and mobile devices that meet software, video and audio requirements. If you need your agents to participate in video meetings, for example, make sure they have video streaming devices that meet your needs.

Phones and headsets

Most people don't have the hardware they need to make and take customer service calls at home. As you build your remote centre, provide your agents with microphone-enabled headsets that work with their computers and/or phone systems. Some companies allow agents to use physical phones when working remotely, but you can also provide built-in softphones to improve agent efficiency and call quality.

Essential virtual contact centre software features

To achieve virtual contact centre success, these are the top capabilities your solution must include.

1. Easy implementation

Whether you're starting from scratch or transitioning to a virtual setup, you need to be up and running with as little disruption as possible. Look for a provider that offers active guidance during the implementation process to save time and avoid downtime for your agents and customers.

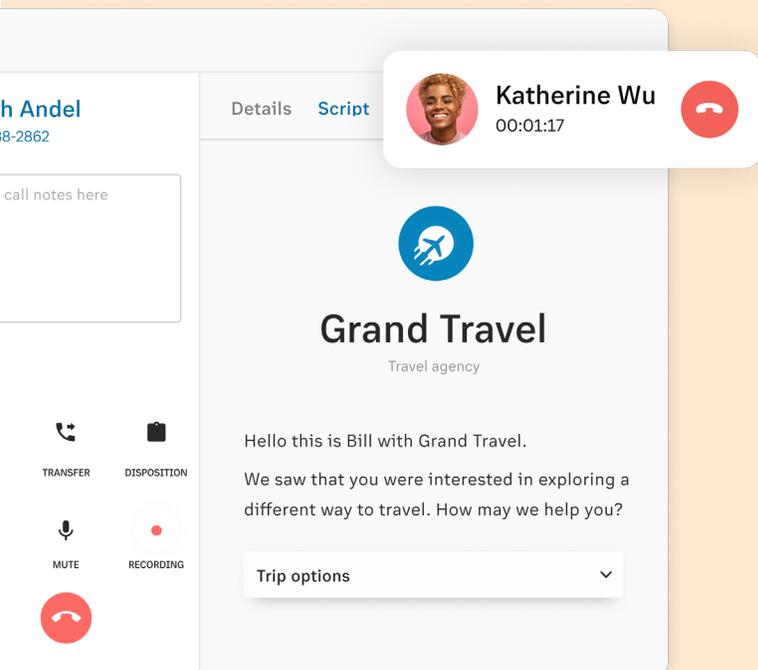
2. Collaborative support

When your agents work exclusively through your system, you need a tool that supports easy collaboration. Your solution should offer live chat for internal communication and video conferencing capabilities for more formal meetings. If your team will offer both private and public discussions, such as webinars, look for these capabilities as well.

3. Workforce management

Managers won't be able to physically monitor your hybrid agents' work and productivity all the time, so empower their success with workforce and agent management tools.

Your supervisors should be able to use your solution to view data for every inbound and outbound call. With the ability to access real-time analytics for each agent, they can identify potential weaknesses that can damage your customer service.

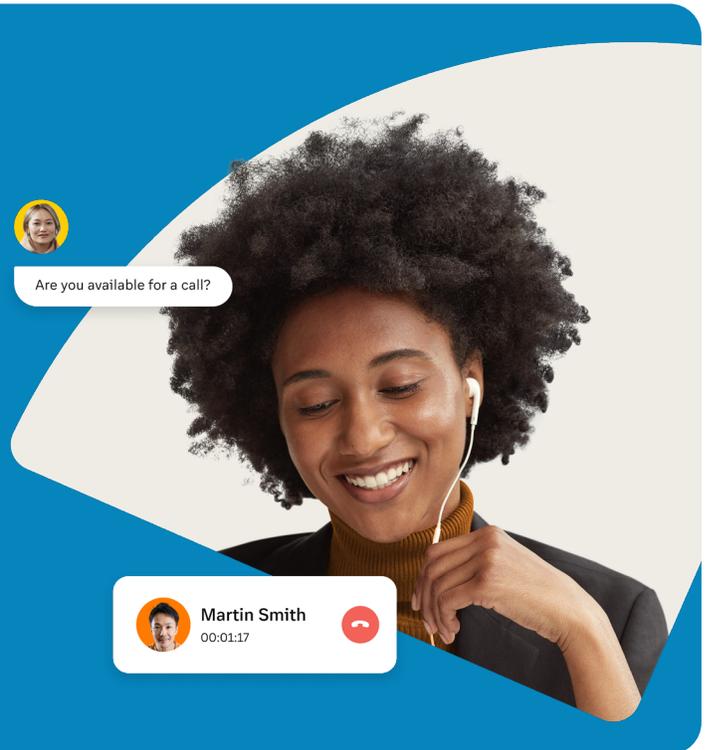


Workforce management tools also help your managers with scheduling tasks. Effective scheduling can help you avoid agent burnout, so give your managers a solution that informs their decisions. This type of technology also provides insights that enable you to give agents tailored coaching and gamification to motivate them.

4. Flexibility and scalability

To maintain flexibility, you need a contact centre platform that allows you to build custom solutions for your specific needs. Look for software that allows you to adjust the size of your workforce with ease and speed. You won't need to sit on unused chairs or equipment during the off-season.

Instead, you can design a solution that fits your budget and call volume at all times.



5. Reliable security

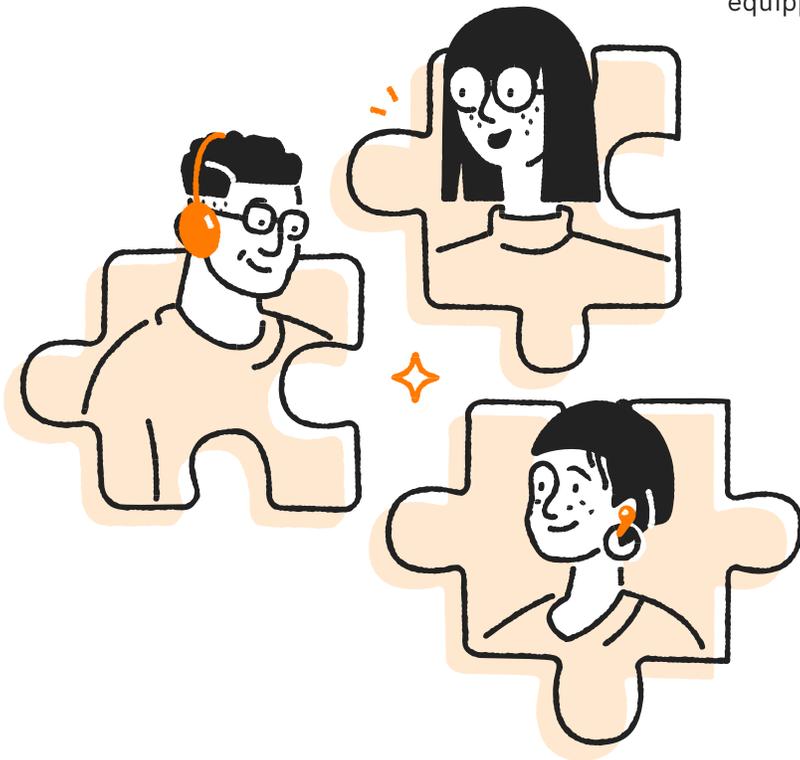
Virtual contact centres operate completely in the cloud, so powerful data protection is absolutely critical to your customer service. When your agents input personal customer information or your customers submit sensitive data through your system, you need to know that this information will remain secure. When considering a software option, evaluate the security features and tools the provider offers. If a software's security fails, after all, your customers and business will be most at risk.

6. Disaster recovery

When comparing cloud-based and on-premises contact centre solutions, disaster recovery is one of the greatest potential benefits for cloud contact centres. If your business office location experiences an emergency, such as a natural disaster or power outage, your platform should keep your contact centre running without interruption. If your software solution has adequate security, you can also protect your contact centre from any security breaches that affect the rest of the business. Many software providers offer nearly perfect uptime guarantees, so look for a solution that is known for its reliability.

7. IVR systems

There are already many demands on your agents' time, so streamline the call process with an interactive voice response (IVR) system. When customers call, they'll be routed through a series of automated questions that connect them to the right agent and department. For frequently asked questions, such as queries about office hours and simple billing info, customers can get their answers without talking to a live agent and wasting time. IVR systems also improve the customer experience by sending them to the agent best-equipped to resolve their problems.



8. Coaching tools

These tools are especially important when working with a remote team. If you notice a call escalating, for example, you can use a whisper coaching tool to guide your agent through the interaction. If the customer remains unsatisfied, a call barging tool allows you to take over the call when necessary. Coaching and call monitoring tools are invaluable to your training and quality assurance processes, helping your managers guide agents to their greatest potential.

9. Analytics and reporting tools

In our digital world, data analysis is a must for customer success and support. The ideal contact centre solution should offer access to in-depth metrics that you can use to measure and improve your customer service. Look for a platform that offers real-time and historical data on calls, interactions, service levels, queues and more.

Your software should also offer numerous options for reports on your contact centre metrics. Rather than spending hours downloading and charting the data yourself, you can get a comprehensive understanding with just a few clicks. When presenting data at stakeholder meetings, this feature is a valuable resource that you can use to demonstrate growth and success.



Contact centre software integrations

It's much better when tools can talk to each other. Choose a contact centre that integrates with the tools you already rely on. Many integrations are either free or available for a low cost, helping you maintain great service within your budget.

1. CRM integrations

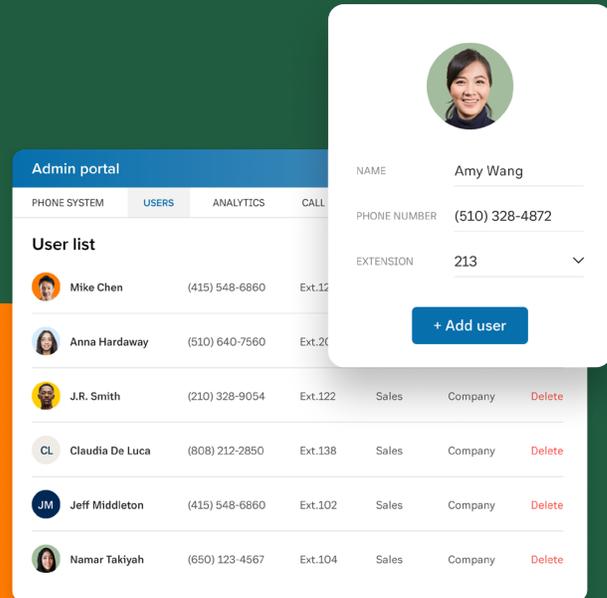
Your customer relationship management (CRM) system is one of your most important tools. It gathers and records customer data with every interaction, building a comprehensive history that your agents can use to better understand customer needs and deliver a more personal service.

When a customer connects with your contact centre, your CRM shows a pop-up that offers their data, relevant social media and details about previous interactions. This instant information allows your agent to quickly meet the customer's needs without re-asking questions about their account.

An unconnected CRM system frustrates agents and lengthens customer interactions. Your agents will have to jump back and forth between tools, disrupting their service and affecting their customer support. Instead, put their needs first with a built-in integration.

2. Work management apps

Like CRM integrations, work management app integrations limit the number of programmes your agents have to use during the workday. If your company uses an app such as Asana, Trello or Slack to manage your projects and assignments, you can use this integration to further streamline your work.



3. Industry-specific tools

Along with popular third-party integrations, your software should also have the ability to integrate with apps that are specific to your industry and business. While some integrations are universal to customer service operations, your business or industry may use lesser-known applications to support your work.

If you want to integrate these specialised tools with your contact centre solution, the software you choose should offer open APIs that allow you to customise your solution's features. If you have a software developer on staff, they can give you the freedom to manually build these apps into your platform. If not, however, look for an option that offers numerous out-of-the-box integrations. While you can still customise your software features, this eliminates the need for extensive coding knowledge without limiting your capabilities.

4. Missing features?

Even though there are numerous contact centre platforms that offer many of the features on this list, you may not be able to find an option that checks every box. If you are struggling to find the perfect balance for your solution, look for a platform with integration capabilities that can help you fill the gaps.

If, for instance, you run a small operation that doesn't have the budget or need for an extensive omnichannel solution, consider supplementing your call capabilities with a live chat integration for your website. When your CRM system strains your budget, see if you can find a free or low-cost alternative that easily integrates with the platform you use.

Many contact centre solutions offer incredible flexibility and customisation abilities, so choose the option that will support your every need.

Examples of virtual contact centres doing it right

Still unsure about the benefits of moving your customer service to a virtual contact centre? These four businesses introduced RingCentral's omnichannel contact centre platform to their operations, using cloud computing, unified communications, and flexibility to boost their capabilities and results. Read their customer stories to see how our solution can benefit your business as well.

Valda Energy: A disrupter in a disrupted world



Founded in 2019, Valda Energy supplies gas and electricity to SME businesses. The company uses smart meter technology, customer focused solutions and 100% renewable power. A disrupter in its market, Valda Energy was set for great success. However, less than six months after launching, COVID-19 threatened its entire operation.

Fortunately, the startup continued providing the energy lifeline many of its customers needed during the crisis, thanks to its choice of communications infrastructure.

By using cloud-based technology, the company offered customers uninterrupted access to contact centres and all regular communications channels, whether staff were working remotely or in the office. With RingCentral Contact Centre in place for its inbound and outbound teams, as well as RingCentral's communications platform for employees, the business was prepared for all lockdowns.

“Because we have a flexible communications platform, moving our team home or to the office doesn’t create challenges or compromise our service quality. We can focus on prioritising employee wellbeing and ensuring all of our service channels are kept open.”

– Daljeet Kaur, Valda Energy’s Operations Director.

The business is ready for the hybrid future. With RingCentral technology in place, agents and all other employees can work in the office, at home and anywhere in between.

**The Marlowe Theatre:
A new communications
system takes the stage**

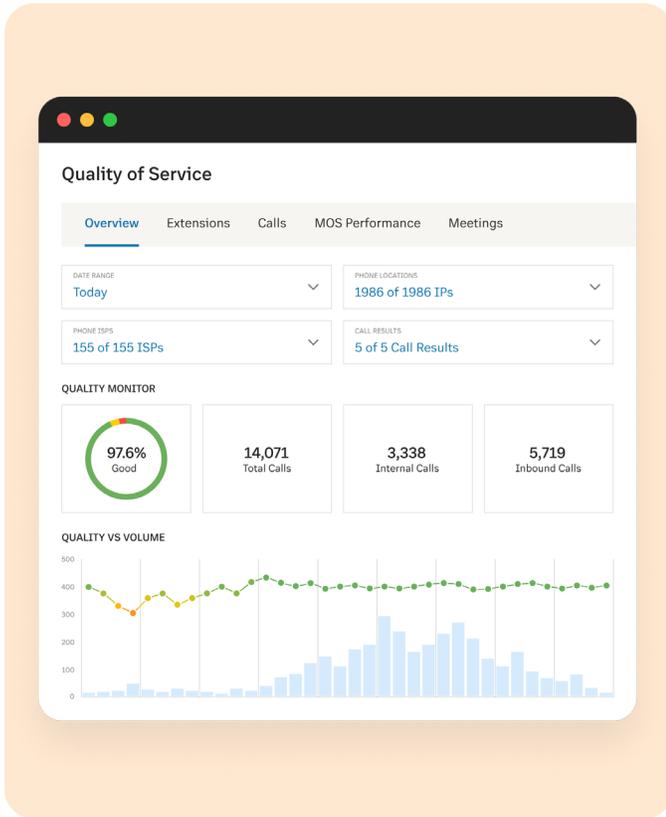
THE MARLOWE

The Marlowe Theatre attracts many of the biggest productions from around the UK. In just the 2019/2020 season, The Marlowe’s 562 performances sold more than 352,000 tickets. This gives an idea of how much demand the theatre’s customer service team handles. As Canterbury City Council ran the theatre up until a few years ago, the theatre was tied to outdated telephony solutions the council set up.

“We had been forced into a telephony infrastructure that required onsite servers, lacked much of the functionality we wanted, and wasn’t integrated into our call centre.”

– Paul Turner, Marlowe Theatre’s IT and finance director.

However, when the theatre became an independent charity, the team jumped at the opportunity to change the technology in place. The Marlowe Theatre needed a solution that connected its call centre to the rest of the organisation, and integrated with tools such as email, chat and CRM. The search for something new didn’t take long. “We began a thorough investigation of cloud solutions and RingCentral won out in terms of features, ease of use, flexibility and cost,” Paul Turner comments.



New features improved the customer experience, even throughout the crisis. Analytics enabled the team to accurately schedule agents according to demand. The theatre integrated email right into its agents' workflows and preloaded answers to FAQs. Different on-hold messages were available for members and non-members, and the Call Whisper feature meant agents had information on the customer before picking up the call.

It's safe to say that The Marlowe is ready for its agents to work from anywhere as social restrictions ease.

About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact centre solutions based on its Message Video Phone™ (MVP®) global platform. More flexible and cost effective than the on-premises PBX and video conferencing systems it replaces, RingCentral helps employees communicate across devices from wherever they are. RingCentral offers three key products. RingCentral MVPTM combines team messaging, video meetings, internet phone and other functionalities in a single interface. RingCentral Video®, along with its team messaging feature, enables Smart Video Meetings™. RingCentral Contact Centre™ gives companies the tools they need to connect with customers across channels. These are available on an open platform that integrates with hundreds of third-party apps and makes it simple to customise workflows. RingCentral is headquartered in Belmont, California, USA, and has offices around the world.

For more information, please contact one of our solution experts. Visit ringcentral.com/gb/en or call 0800 098 8136.